



THE INSIGHT GROUP

The Public's Use of Outdoor Resources in Massachusetts

**A Marketing Research Study Conducted for:
Department of Conservation and Recreation (DCR)**

Prepared by The Insight Group and Dorr Research Corp.

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Introduction

The Department of Conservation and Recreation (DCR) was interested in conducting market research to learn more about its “core users” and to understand the characteristics and motivation for their use of state park and recreational facilities. By gaining greater insight into users of the parks and other recreational facilities, partnerships can be formed with private entities. These partnerships can extend the DCR “brand” and can provide additional marketing resources.

Research Objectives

The objectives of the research study centered on:

- ✓ Determining the profile of the DCR user – in terms of demographics, age, race, gender, household income, education
- ✓ Determining what characteristics distinguish core users from non-users
- ✓ Determine what specific activities are important to them when they select and/or use a DCR park or other facility.

Research Methodology

In order to answer the above objectives, a quantitative research study was implemented. In order to obtain a representative sample of households throughout the state, random telephone interviews were conducted. The following details the specifics of the research plan:

- ✓ A total of 400 interviews with users – that is, respondents who claim usage of parks, recreational facilities and public spaces within the previous 12 months.
- ✓ A total of 100 interviews with non-users of parks, recreational facilities and public spaces.

In all cases, the person being interviewed was defined as the responsible decision-maker within the household – in this case, 63% of those interviewed were females.

Throughout this study, the maximum margin of error (at the 95% Confidence level) for each segment is:

- ✓ Among the 400 users: +/- 5 percentage points.
- ✓ Among the 100 non-users: +/- 10 percentage points.

Findings

Incidence of Usage

54% of contacted households indicated that they had used a park, recreational area or public space at least once in the past 12 months.

This figure represents a statistically significant increase from the 42% reported in the previous study in 1994.

Profile of Users vs. Non-users

Overall, users are younger, better educated and more affluent than non-users. There are more white collar users than any other type. Users also spend about double on outdoor recreation than non-users.

	<u>Users</u>	<u>Non-users</u>
Under 35	25%	18%
Age 35-54	50	35
Age 55+	25	42
White collar	58	31
Blue collar	20	15
Not working	14	37
Caucasian	85	73
Latino	3	2
African-American	3	6
Asian	2	4
Attended college	79	59
Graduated College	60	38
HH Income <\$40K	20	31
\$40K - \$49K	12	7
\$50K - \$74K	19	14
\$75K - \$99K	14	7
\$100K +	17	6
Have child in house	65	48
Child <age 11	41	10
Child age 11+	54	48

Claimed median annual expenditure for outdoor recreation consisted of **\$1,034** for users and only \$500 for non-users. It appears that people who use park and recreational facilities frequently spend more overall on outdoor activities.

Reasons for Non-Use

Respondents who said that they had not used a park or recreational facility in the past 12 months were asked for their reasons for non-use. The primary reason for non-use was that respondents said they were too “busy” or had other time constraints that made it difficult for them to visit a park/recreational facility. Additionally, some respondents indicated a “lack of need” for park and recreational facilities since they either had other alternatives or did not see a strong reason to consider usage.

<u>Reason for Non-Use</u>	<u>%</u>
Time constraints (skewed under age 45)	22%
Not interested/no reason to use (skewed age 45+)	17
Too old (skewed age 45+)	15
No children (skewed age 45+)	13
Don’t travel much	8
Live alone (skewed 45+)	7
Health reasons/handicapped (skewed age 45+)	7
Have summer home/have own pool/playground	5
Not available in this area (skewed age 45+)	4
Lack of funds/can’t afford to travel (skewed under age 45)	4

Note: The 100 respondents who participated in this part of the research study were divided in the following manner: 42% male/58% female.

Types of Facilities Used (Previous 12 Months)

The most popular types of facilities used were beaches and parks, which were popular with almost all respondents. Other types of facilities were less used although some types of facilities still were mentioned by a majority of respondents as places they had visited.

<u>Type of Facility (multiple answers)</u>	<u>%</u>
Beaches	84%
Parks (skewed under age 55)	79
Public playgrounds (skewed under age 55)	60
Historic sites (skewed toward age 55+)	58
Public trails	52
Public ball fields (skewed under age 55)	47
Public green spaces (skewed age 35-54)	46
Campsites	27
Public swimming pools	23
Public rinks	16

Facilities Used Most Frequently in Past Year

Respondents were asked to indicate the estimated number of times they had used a type of facility, the number of miles they estimated it was from their home and the preferred months of the year that they used that type of facility.

The most widely used facility types continued to be beaches and parks. However, the most frequently used types of facilities by users were: rinks, green spaces, trails and parks.

People tended to travel farthest for camping and to see historical sites. In terms of seasonal appeal, trails have the broadest appeal.

<u>Type of Facility</u>	<u>%</u>	<u>Mean Times</u>	<u>Median Miles</u>	<u>Preferred Months</u>
Beaches	30%	25	15	Jul-Aug
Parks	25	42	3	Jul-Aug
Public playgrounds	11	31	2	Jun-Aug
Public ball fields	9	32	2	Jun-Jul
Public trails	7	42	4	Sep-Oct/May-Jun
Campsites	5	10	65	Jul-Aug
Historic sites	5	20	25	Aug
Public green spaces	4	47	4	Jun-Aug
Public rinks	2	15	2	Oct-Dec

Note: 57% of respondents indicated that they traveled under 5 miles to reach the facility that they visited most frequently. 9% traveled 6-10 miles; very few people traveled longer distances to reach a site. Most respondents tend to stay close to their home area and do not venture far. Respondents are more willing to drive farther to reach a beach or a campsite.

Leading Activities (Previous 12 Months)

Among all the activities that respondents participate in, walking and swimming were the only **active** pursuits among the top five most popular. The others were relatively more passive and speak to the large variety of things that consumers perceive as available to them in parks. At the same time, respondents enjoy a variety of activities and appear to use parks and recreation facilities for many reasons.

<u>Activity</u>	<u>% Saying They Participate</u>
Walking	80%
Picnicking	52
Swimming	48
Attending an event	48
Historic appreciation (skewed age 35+)	43
Hiking	42
Bicycling (skewed under age 55)	40
Boating/sailing (skewed age 35+)	34
Running/jogging (skewed under age 35)	33
Dog-walking	29
Nature study (skewed age 35+)	27
Camping	22
Fishing	22
Skating/hockey (skewed under age 55)	14
Mountain biking (skewed under age 55)	14
Downhill skiing	10
Sailing	8
Motorized off-road vehicles	7
Cross-country skiing	7
Hunting	4
Horseback riding	4
Snowmobiling	3

Important Services/Facilities

Respondents were asked to indicate how important a list of services was to them in terms of their usage of parks/recreational facilities. Overall, general upkeep of the facilities is deemed to be very important to their selection and usage of parks. Restroom facilities and exercise opportunities are also key factors in a consumer's rating of things that are important to them.

<u>Service</u>	<u>% Rating "Very Important"</u>
Regular maintenance	82%
Restroom facilities	67
Opportunity for healthful exercise	64
Security presence/safety (skewed age 55+)	43
Playground facilities	41
Lifeguards	41
Swimming	34
Organized education programs (skewed underage 35)	31
Signage, brochures, printed material (skewed age 55+)	31
Accessible programs (skewed age 35+)	25
Organized recreational programs	23
Exhibits	18
Equipment rentals	10

Important Characteristics that Affect Usage

Respondents were asked which specific characteristics of parks/recreational facilities were most important to them. Not surprisingly, cleanliness of the location was of primary importance to the majority of respondents. Other significant factors included the availability of parking, the fact that it was a natural or peaceful setting, and the overall perception that the facility was well maintained and in good condition. Interestingly, proximity to home was only important to one out of five respondents. Availability of public transportation was only important to a small percentage of respondents, since most people probably drive to their location (thus the concern about parking) and also because they are only going a short distance (less than 5 miles).

<u>Characteristic</u>	<u>% Saying "Very Important"</u>
Cleanliness	90%
Natural or peaceful setting	71
Availability of parking	69
Well maintained landscape and facilities	65
Not crowded (skewed age 35+)	42
Cost or price (skewed under age 35)	39
Proximity to home	36
Active setting	24
Availability of public transportation	22

Obtaining Information

Since the prior study (in 1994) the internet has become a major medium for a large number of people and an excellent information resource. Not surprisingly, a number of younger respondents said that they obtained information about parks and recreational facilities through the internet. This vehicle is tied with "word-of-mouth" as a means of obtaining information; however the usage of the internet is more skewed to younger consumers who are, as expected, more internet "savvy". Use of printed material (brochures, guide books) was lower, although still not insignificant. Newspapers continue to be an effective medium to reach older consumers.

<u>Method of Obtaining Information</u>	<u>%</u>
Word-of-mouth	44%
Internet (skewed under age 55)	43
Newspaper (skewed age 55+)	38
Brochure (skewed age 55+)	13
Guide book	13
Television/radio	12
Road signs	5
Maps	4
School or educational program	2
Toll-free 800#	1

Awareness of DCR

Respondents were asked if they had ever heard of DCR. While the organization has not done a great deal of advertising or marketing, a large number of respondents claimed to be aware of DCR. Older respondents were more aware of DCR than younger respondents; however a majority of all respondents had heard of DCR. This may reflect the fact that so many respondents claim usage of the park and recreational facilities and may perhaps have seen signage or other printed material that provided name recognition.

	<u>Under 35</u>	<u>55+</u>
Definitely aware	55%	71%
Possibly aware	23	19
Definitely not aware	22	10

Summary and Conclusions

In the ten years since this previous quantitative study, there have been many changes in both usage and perceptions of parks and other recreational facilities. The following conclusions can be reached:

- ✓ Use of DCR facilities has increased **significantly** – from 42% to 54%.
- ✓ $\frac{3}{4}$ of current users are under the age of 55. This would be logical since younger consumers with children would appear to be more likely users of parks/recreational facilities. At the same time, DCR is not getting a large share of older consumers who are less likely to consider a DCR site.
 - Users tend to be better educated, more affluent and more likely to have children.
- ✓ Nearly half of all **non-users** are age 55 or older. For them, there is less likelihood to consider a DCR facility:
 - The primary reasons for non-use are time constraints, a lack of interest, a lack of perceived need and their age.
 - Non-users tend to be less well educated and less affluent than users.
- ✓ Beaches and parks are the most used facilities in the DCR system. This is not surprising, given the fact that these facilities comprise the bulk of DCR's holdings.
- ✓ In terms of places that command a lot of repeat use – rinks, green spaces, trails and parks are the most popular.

- ✓ People are willing to travel the farthest for camping, perhaps because they do not do this activity often, so they are willing to make an expedition out of it.
- ✓ The leading activities overall include: walking, going on picnics, swimming, attending events, and enjoying historic appreciation. However, other activities have appeal and widen the range of consideration.
- ✓ Key “hot buttons” that are important to consumers include knowing that a facility is well maintained, that there are restrooms available, that they will be able to get exercise, that the facility is clean and that there is ample parking. These features should be stressed in all communication efforts.
- ✓ The best way to reach younger consumers is through the internet.
- ✓ The best way to reach older consumers may be through newspapers and other printed material. However, as the internet reached more older consumers, this vehicle will become increasingly popular.
- ✓ Many people get information through “word-of-mouth” which may be the richest source of communication for DCR.
- ✓ A significant number of consumers are aware of (have heard of) DCR. While there is potential to increase awareness, it is encouraging that so many people claim to be aware of DCR.

Recommendations

It would appear that DCR is in very good shape to broaden its appeal. Consumers seem to be satisfied with the park and recreational facilities available to them and are using DCR facilities frequently. More than half of all consumers have visited a park or recreational facility in Massachusetts within the past year.

The following recommendations are based on the findings from this research study:

- ✓ Increase awareness of the depth and breadth of the DCR system so that people will consider using more sites more frequently.
- ✓ Develop partnerships with appropriate private sector brands to further extend the DCR name and to fund more programs.
- ✓ Reach non-users with messages that communicate the benefits of the state park and recreation system. Non-users tend to be older (without children in the household) and perhaps do not perceive that DCR facilities are appropriate for them. Stressing the advantages of DCR's parks and recreational facilities could promote additional consideration and usage.
- ✓ Extend seasonality: the bulk of respondents use the system primarily during the summer months. While this is to be expected, encouraging shoulder season and winter usage will increase revenues. Communicate things to do in winter so that consumers think of DCR in the off-season.

Demographic Profile of Respondents

Sample composition for this study was as follows:

Male	37%
Female	63%

Under 25	6
25 – 34	19
35 – 44	30
45 – 54	20
55 – 64	15
65+	10

Appendix Additional Information

Volunteering to a Park/Recreational Facility

One-quarter of all respondents claim to have volunteered at a park or recreational facility. There were no strong demographic skews to the respondents:

Ever have volunteered:	26%
Among those under 35	25
Among those 35-54	28
Among those 55+	23
 Among those with children <age 11	27
Among those with children age 11+	30
Among those with no children	23
 Among those with hhld income <\$40K	30
Among those with hhld income \$40 - \$74K	30
Among those with hhld income \$75K+	27

Incidence of Public-Spirited Behavior

Five out of six respondents have demonstrated some public-spirited behavior, primarily by voting. Over one-third of all respondents have ever contacted a legislator. Public-spirited incidence is highest among people age 35+.

Voted during previous five years (skewed age 35+)	83%
In a national election	81
In a statewide election	77
In a local election	71
Have ever contacted a legislator (skewed age 35+)	35

Main reason for contacting a legislator:	
Give opinion on bills	23
For educational funding	11
To support an issue	9
Looking for information	7
Work-related	6
To obtain assistance	4
Personal business	4
Gay rights/gay marriage	4
Community affairs	4
Disability issues	4
Conservation/environment	4
Lobbying for business	4

